

EXHIBIT B-1

Assessing Staff Meeting

Monday, March 18, 2019

1. Expectations

Goals

Structure of the Department – reporting and review.

2. Metrics

Individually and departmental

3. Correspondence and Citizen Requests

4. Staff Feedback and Concerns

Assessing Staff Meeting

Monday, April 1, 2019

1. Public vs Non-Public

Staff Meetings – if a member of public has questions – John or I will answer

Instructions for Board of Assessors

2. Policies – Create a Form - Request for multiple documents will be answered within 5 days.

Name, address, phone number, documents requested and cost. Make copy for taxpayer.

Tax Rep for abatements - Ask & document, ask their preference of contact

3. Correspondence and Citizen Requests – going forward Mike, Gary and Greg will not speak with Ms. Ortolano. Please write down any questions and they will be answered in writing.

Please create a call log – date, item requested, information needed etc.

4. NEREN Agreements

All memberships should be brought to John or I. Are there any other?

5. Website – Recreate – more citizen friendly, easier to understand

6. Staff Feedback and Concerns

Talking within the office

7. Space – need to redesign the office – no more citizens in the hall.

Assessing Staff Meeting

Monday, April 8, 2019

1. Board of Assessors Meetings

Rules/Bylaws

2. Policies – Review the form Cheryl made - Request for multiple documents will be answered within 5 days.

Online versions?????? How are these being handled now???

3. Tax Rep for abatements - Ask & document, ask their preference of contact – Meetings should be with both parties at the same time.

3. Correspondence and Citizen Requests – going forward Mike, Gary and Greg will not speak with residents with large multiple requests on properties not owned by the individual. Please write down any questions and they will be answered in writing.

What has been the reaction ??? Concerns????

4. Updates on metrics –

Upcoming time off / Education Scheduled etc.

5. Website – Update – more citizen friendly, easier to understand

Kim's meeting with Bruce,

6. Staff Feedback and Concerns

Assessing Staff Meeting

Monday, April 22, 2019

1. Outreach:

April 20th – Louise at Senior Summit

April 22nd – Kim, Pam, Louise and Greg at City Academy

April 30th – Kim, Louise and Greg at Special Board of Aldermen

2. Need for Data- Please send to Kim by Wednesday – Update on all Metrics

3. Daily Travel Reimbursements, Invoices please send to Kim for approval. Tracking spreadsheets for finances.

3. Tracking of all Trainings, Recertification dates, upcoming dates for NHAEO and related meetings

4. Job Descriptions

5. View Factor

6. Staff Feedback and Concerns

Note: Mayor's Senior Summit, Saturday, April 20 – 9am to noon

Assessing Staff Meeting

Friday, May 17, 2019

1. Process Improvements

Sales letters

Abatements - create a document

Mailing property cards - with explanation of card

Door tags - numbering

Field reports - contact person

Documentation on property cards

Appointments - scheduling of assessors

Website tools

Tips from Statutes training

2. Assessing 101 - workshop

3. Training

Kim training on Assesspro

4. Software update

5. HR Item

6. Updates to Board of Assessors meetings

7. Staff Feedback and Concerns -

Assessing Staff Meeting

Friday, May 23, 2019

1. Update of Metrics

Sales letters

Abatements

Mailing property cards with explanation of card with Abatement letter

Parsonage – Chandler St

Documentation on property cards

Appointments - scheduling of assessors - update

Send Right to Know requests/ and sign in Logs to Karina

2. Assessing 101 - workshop

3. Board of Assessor Meeting 6/6/19

5. Software/Website update

6. Staff Feedback and Concerns -

Assessing Staff Meeting

Friday, May 31, 2019

1. Update of Metrics

Sales letters – How many returned? Called?

Abatements - How many scheduled for 6/6?

Mailing property cards with explanation of card with Abatement letter

Appointments - scheduling of assessors - update

2. Right to Know requests and Multi -Informational Requests

Send copies to Karina

Logging of Work Time

3. Assessing 101 – Workshop

Documentation and Displays

4. Software/Website update

New Release

5. Hours - Thursdays

6. Staff Feedback and Concerns -

7. June 6th Meeting with KRT

8. Board of Assessor Meeting 6/6/19

Parsonage – Chandler St

Assessing Staff Meeting

Friday, July 12, 2019

1. Update – Workload and Priorities

Sales letters – How many returned? Called?

Abatements - How many remaining and schedule?

Appointments - scheduling of assessors - update

2. BTLA

3. Software/Website update

New Release

4. Vacations – Schedules

5. Full Measure and List

6. Communication – Concerns and Inquiries

7. Staff Feedback and Concerns

Assessing Staff Meeting

Friday, July 19, 2019

1. Current Initiatives

Sales letters – How many more have been returned? Additional to be issued?

Abatements - How many scheduled for 8/1?

Appointments - scheduling of assessors - update

Policy Review – Each Assessor must review policy draft handbook and confirm they are correct and being followed advise Kim and Louise of any necessary changes.

Spring Reviews

Building Permits

Technical Audit

2. Right to Know requests and Multi -Informational Requests

Send copies to Karina – sign in sheets, Property cards requested
Assesshelp questions regarding assessments will be forwarded to me, if an assessor needs to answer we will discuss on Mondays and share with Legal

3. NEW – Weekly Assessor meetings – Monday morning 8 am

Review of Properties

Review of information requests

Audit questions

Peer review

See email provided

4. Software/Website update

Demo on July 24th 10 am – taping

Awaiting contract and timeline – requested by EOB today.

Assessing Staff Meeting

Friday, August 30, 2019

1. Current Initiatives

Appointments - scheduling of assessors - update

Policy Review – Each Assessor must review policy draft handbook and confirm they are correct and being followed advise Kim and Louise of any necessary changes.

Spring Reviews

Building Permits

Technical Audit

2. NEW – Weekly Assessor meetings – Monday morning 8 am

3. Software/Website update

AP5 upgrade

4. Staff Feedback and Concerns -